Reviewing and Routing a Requisition
(9/2003)

When a Requisition is sent to you in PRISM for your Review, you will get an e-mail notifying you. To review the Requisition, follow these steps:

1. Log On

User ID: bjwoodya

Password: ••••••••••••

Logon

> 1. Enter your "USER ID"

> 2. Enter your "password."

> 3. Click the "Logon" button.

2. Welcome Page

Welcome BRIAN WOODYARD
You have 1 unread messages in your Inbox.

Inbox
APP
Requisitions
Solicitations
Purchase Orders
Contracts
Catalog Orders
Delivery / Task Orders
BPA Setups
BPA Calls
IAA
Documents
Receiving
Invoice
Milestones
Preferences
System Setup
System Utilities
FPDS
Tools
Log Off

Last Documents Accessed:
Delivery/Task Order: GS-35F-5355H/CSB-02-0002
Contract: TPD-PD-02-Z-00023
Delivery/Task Order: TPD-01-C-0030/0035
Delivery/Task Order: TPD-01-C-0030/0036

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Product information.

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Commerce Business Daily
Federal Business Opportunities
GSA Advantage!
GSA Debarment
Maintenance Schedule and Outage Status

Get Acrobat Reader To view or print forms from PRISM, you will need the Adobe Acrobat Reader. If you ne download.

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> <u>NOTE</u>:
> You will have a note under your name that you have at least one unread message in your Inbox.

> Click on Inbox in either location to access your document(s).

3. Inbox

The Inbox defaults to the "For Approval" section, so you need to click on "For Review" to access any documents awaiting your review.

4. Inbox – For Review

To review the Requisition, click the document number link.

5. Viewing the Document

You are now able to view the document. If the user who created the document has granted Document Sharing or Ownership rights to you, then you can edit the document as well.
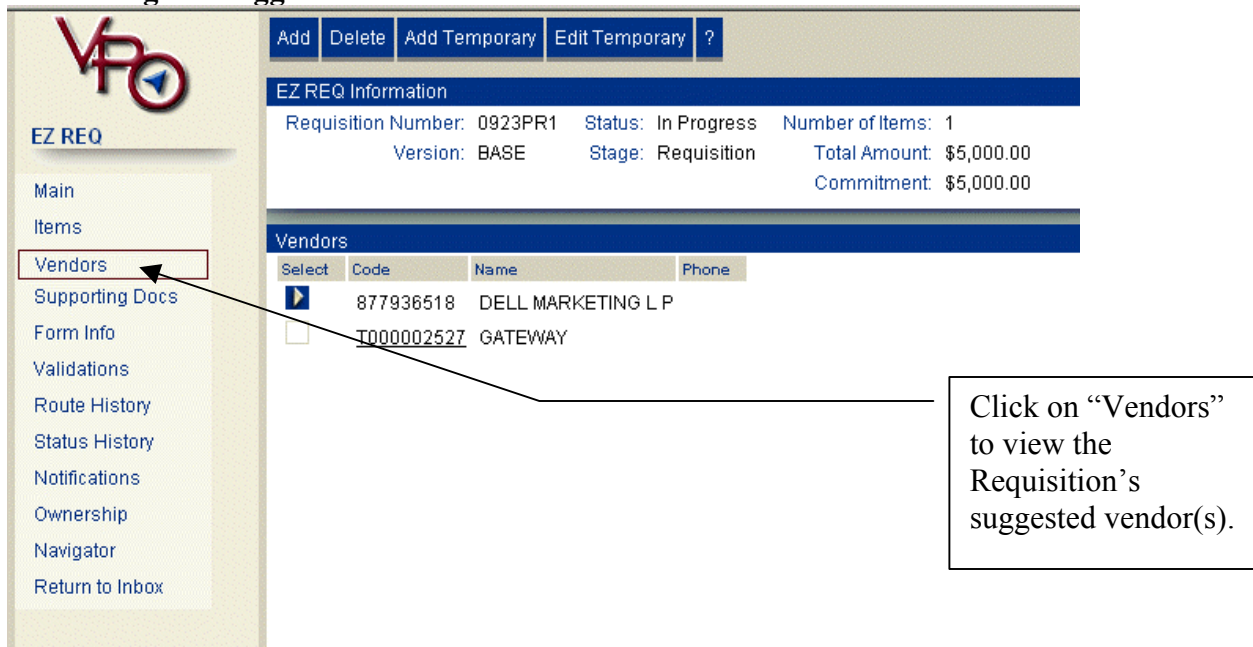

When the document is opened for viewing, it defaults to the "Main" section.

NOTE: The total amount of the Requisition can be seen here.

6. Viewing the Line Items

Click on "Items" to view the Requisition's line item(s).

7. Viewing the Suggested Vendors

| Add | Delete | Add Temporary | Edit Temporary | ? |

EZ REQ Information

Requisition Number: 0923PR1 Status: In Progress Number of Items: 1
Version: BASE Stage: Requisition Total Amount: $5,000.00
Commitment: $5,000.00

Vendors

Select	Code	Name	Phone
▶	877936518	DELL MARKETING L P	
☐	T000002527	GATEWAY	

EZ REQ navigation: Main, Items, Vendors, Supporting Docs, Form Info, Validations, Route History, Status History, Notifications, Ownership, Navigator, Return to Inbox

> Click on "Vendors" to view the Requisition's suggested vendor(s).

8. Viewing the Supporting Documents

| Add | Check In | Check Out | View | Detail | Approval | Sequence | Unlock | Convert | Delete | ? |

> Click on "Supporting Documents" to view the Requisition's attachment(s).
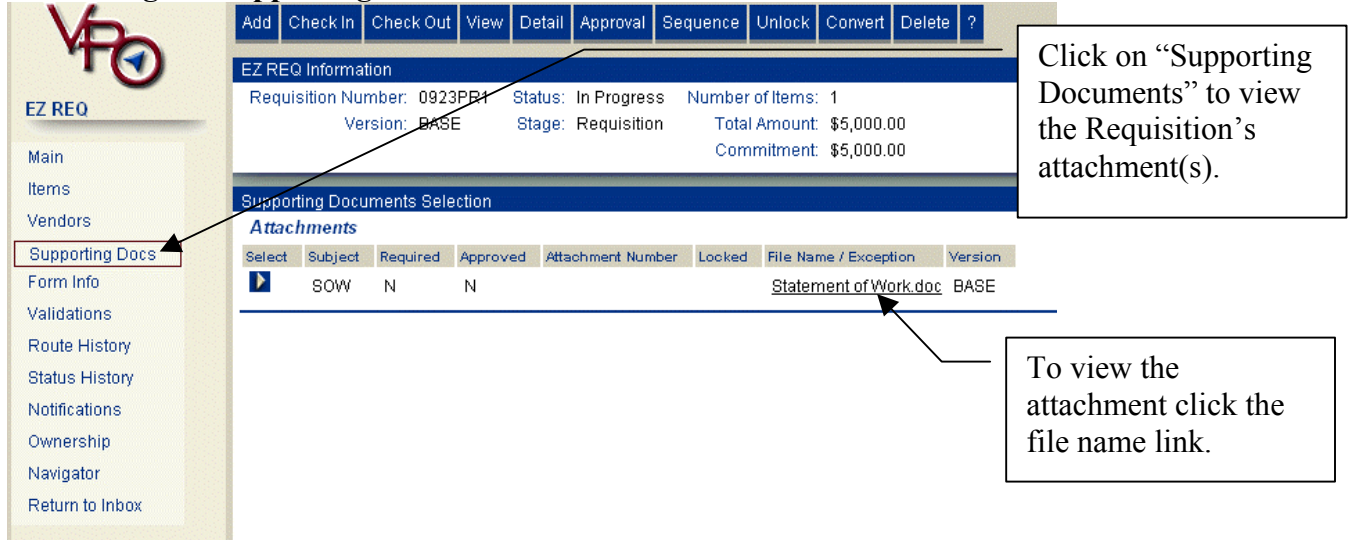
EZ REQ Information

Requisition Number: 0923PR1 Status: In Progress Number of Items: 1
Version: BASE Stage: Requisition Total Amount: $5,000.00
Commitment: $5,000.00

Supporting Documents Selection

Attachments

Select	Subject	Required	Approved	Attachment Number	Locked	File Name / Exception	Version
▶	SOW	N	N			Statement of Work.doc	BASE

EZ REQ navigation: Main, Items, Vendors, Supporting Docs, Form Info, Validations, Route History, Status History, Notifications, Ownership, Navigator, Return to Inbox

> To view the attachment click the file name link.

9. Viewing the Route History

1. Click on "Route History" to see where the Requisition has previously been routed.

2. By clicking on the "Y" under the "Comments" column, you can see the corresponding creator's/reviewer's comments.
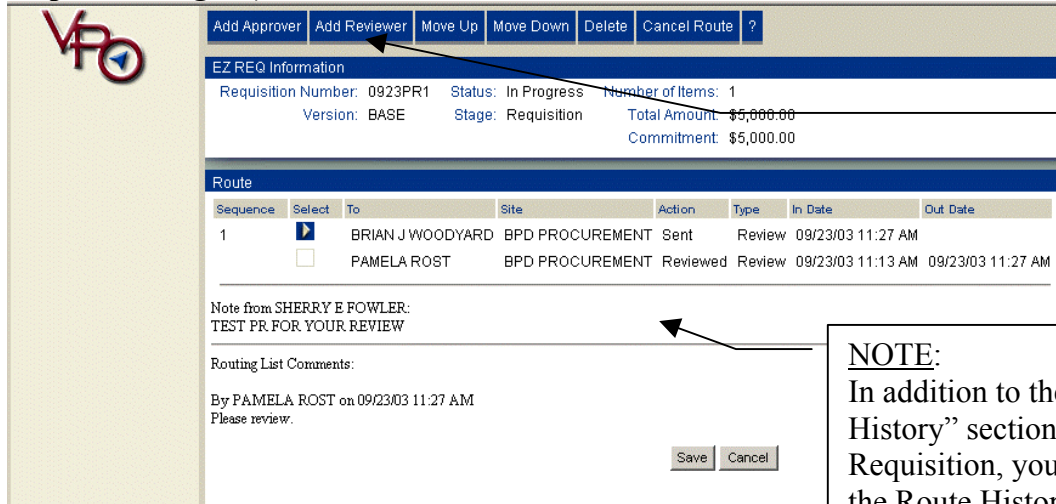
10. Routing the Requisition

When you are finished viewing the various sections and ready to route the document, click the "Change Route" button. (This button can be accessed from the "Main" or "Route History" sections.)

11. Routing to a REVIEWER (If you are routing the document to an Approver, skip to Step 15 on Page 9.)

| Add Approver | Add Reviewer | Move Up | Move Down | Delete | Cancel Route | ? |

EZ REQ Information

Requisition Number:	0923PR1	Status:	In Progress	Number of Items:	1
Version:	BASE	Stage:	Requisition	Total Amount:	$5,000.00
				Commitment:	$5,000.00

Route

Sequence	Select	To	Site	Action	Type	In Date	Out Date
1	▶	BRIAN J WOODYARD	BPD PROCUREMENT	Sent	Review	09/23/03 11:27 AM	
	☐	PAMELA ROST	BPD PROCUREMENT	Reviewed	Review	09/23/03 11:13 AM	09/23/03 11:27 AM

Note from SHERRY E FOWLER:
TEST PR FOR YOUR REVIEW
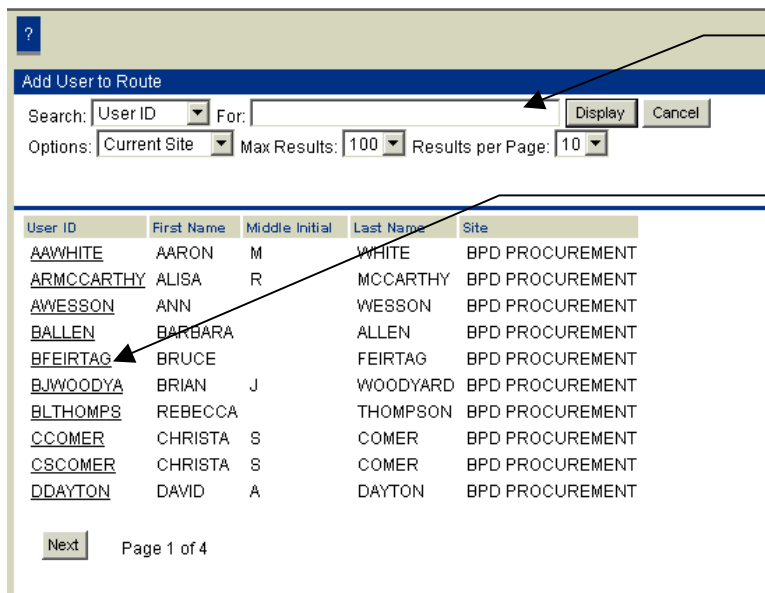
Routing List Comments:

By PAMELA ROST on 09/23/03 11:27 AM
Please review.

Save Cancel

1. Click the "Add Reviewer" Button.

NOTE:
In addition to the Route History" section of the Requisition, you can also view the Route History and any comments in this screen.

?

Add User to Route

Search: User ID ▼ For: [   ] Display Cancel
Options: Current Site ▼ Max Results: 100 ▼ Results per Page: 10 ▼

User ID	First Name	Middle Initial	Last Name	Site
AAWHITE	AARON	M	WHITE	BPD PROCUREMENT
ARMCCARTHY	ALISA	R	MCCARTHY	BPD PROCUREMENT
AWESSON	ANN		WESSON	BPD PROCUREMENT
BALLEN	BARBARA		ALLEN	BPD PROCUREMENT
BFEIRTAG	BRUCE		FEIRTAG	BPD PROCUREMENT
BJWOODYA	BRIAN	J	WOODYARD	BPD PROCUREMENT
BLTHOMPS	REBECCA		THOMPSON	BPD PROCUREMENT
CCOMER	CHRISTA	S	COMER	BPD PROCUREMENT
CSCOMER	CHRISTA	S	COMER	BPD PROCUREMENT
DDAYTON	DAVID	A	DAYTON	BPD PROCUREMENT

Next Page 1 of 4

2. Search for the User as necessary.

3. Click on the User ID link.

12. Sending the Requisition

| Add Approver | Add Reviewer | Move Up | Move Down | Delete | Cancel Route | ? |

EZ REQ Information

Requisition Number:	0923PR1	Status:	In Progress	Number of Items:	1
Version:	BASE	Stage:	Requisition	Total Amount:	$5,000.00
				Commitment:	$5,000.00

Route

Sequence	Select	To	Site	Action	Type	In Date	Out Date
1	☐	PAMELA ROST	BPD PROCUREMENT	Reviewed	Review	09/23/03 11:13 AM	09/23/03 11:27 AM
	☐	BRIAN J WOODYARD	BPD PROCUREMENT	Sent	Review	09/23/03 11:27 AM	
	▶	BRUCE FEIRTAG	BPD PROCUREMENT	Ready to send	Review		

Note from SHERRY E FOWLER:
TEST PR FOR YOUR REVIEW

Routing List Comments:

By PAMELA ROST on 09/23/03 11:27 AM
Please review.

| Send | Save | Cancel |

> The User is now added to the Route List as a Reviewer.

> Click the "Send" button to actually send the Requisition to the User.

13. Marking the Requisition Reviewed

| Change Route | Mark Reviewed | Release | View Form | ? |

EZ REQ

Main
Items
Vendors
Supporting Docs
Form Info
Validations
Route History
Status History
Notifications
Ownership
Navigator
Return to Inbox

EZ REQ Information

Requisition Number:	0923PR1	Status:	In Progress	Number of Items:	1
Version:	BASE	Stage:	Requisition	Total Amount:	$5,000.00
				Commitment:	$5,000.00

Route History

To	In Date	Out Date	Comments	Status	Version	Phone	Site	Routing Symbol
BRIAN J WOODYARD	09/23/03 11:27 AM		N	Sent	BASE		BPD PROCUREMENT	
BRUCE FEIRTAG	09/23/03 01:37 PM		N	Sent	BASE		BPD PROCUREMENT	
PAMELA ROST	09/23/03 11:13 AM	09/23/03 11:27 AM	Y	Reviewed	BASE		BPD PROCUREMENT	
SHERRY E FOWLER		09/23/03 11:13 AM	Y	Originator	BASE		BPD PROCUREMENT	

> 1. Now that the Requisition has been sent, you must mark the document Reviewed by clicking the "Mark Reviewed" button.

| ? |

EZ REQ Information

Requisition Number:	0923PR1	Status:	In Progress	Number of Items:	1
Version:	BASE	Stage:	Requisition	Total Amount:	$5,000.00
				Commitment:	$5,000.00

Review Document

Comments (up to 2000 characters): Route to Orlando Yaconis for Approval.

| Mark Reviewed | Cancel |

> 2. Add comments if desired.

> 3. Click the "Mark Reviewed" button.

14. Viewing the Updated Route History and Returning to the Inbox

EZ REQ

- Main
- Items
- Vendors
- Supporting Docs
- Form Info
- Validations
- Route History
- Status History
- Notifications
- Ownership
- Navigator
- Return to Inbox

Change Route | Release | View Form | ?

EZ REQ Information

Requisition Number: 0923PR1   Status: In Progress   Number of Items: 1
Version: BASE   Stage: Requisition   Total Amount: $5,000.00
Commitment: $5,000.00

Route History

To	In Date	Out Date	Comments	Status	Version	Phone	Site	Routing Symbol
BRUCE FEIRTAG	09/23/03 01:37 PM		N	Sent	BASE		BPD PROCUREMENT	
BRIAN J WOODYARD	09/23/03 11:27 AM	09/23/03 01:56 PM	Y	Reviewed	BASE		BPD PROCUREMENT	
PAMELA ROST	09/23/03 11:13 AM	09/23/03 11:27 AM	Y	Reviewed	BASE		BPD PROCUREMENT	
SHERRY E FOWLER		09/23/03 11:13 AM	Y	Originator	BASE		BPD PROCUREMENT	

NOTE:
The "Route History" section now reflects that you have reviewed the document and that it has been sent.

1. Click "Return to Inbox."

Inbox

- For Approval
- For Review
- Approved
- Disapproved
- Reviewed
- Proxied
- Completed
- Notifications
- Return To Home

?

Documents for Review

Select	From	Document Number	Document Type	Received

2. If you had additional Requisitions for review, they would be displayed here. In this case, there are no remaining Requisitions awaiting review.

3. Click "Return To Home."

Congratulations! You have now successfully routed and reviewed your Requisition.

15. Routing to an Approver

| Add Approver | Add Reviewer | Move Up | Move Down | Delete | Cancel Route | ? |

EZ REQ Information

Requisition Number:	0923PR1	Status:	In Progress	Number of Items:	1
Version:	BASE	Stage:	Requisition	Total Amount:	$5,000.00
				Commitment:	$5,000.00

Route

Sequence	Select	To	Site	Action	Type	In Date	Out Date
1	▶	PAMELA ROST	BPD PROCUREMENT	Reviewed	Review	09/23/03 11:13 AM	09/23/03 11:27 AM
	☐	BRUCE FEIRTAG	BPD PROCUREMENT	Sent	Review	09/23/03 01:37 PM	
	☐	BRIAN J WOODYARD	BPD PROCUREMENT	Reviewed	Review	09/23/03 11:27 AM	09/23/03 01:56 PM

Note from SHERRY E FOWLER:
TEST PR FOR YOUR REVIEW

Routing List Comments:

By PAMELA ROST on 09/23/03 11:27 AM
Please review.

By BRIAN J WOODYARD on 09/23/03 01:56 PM
Route to Orlando Yaconis for Approval.

| Save | Cancel |

> 1. Click the "Add Approver" Button.

> NOTE:
> In addition to the Route History" section of the Requisition, you can also view the Route History and any comments in this screen.

> 2. Search for the User as necessary.

| ? |

Add User to Route

Search: User ID For: oyaconis [Display] [Cancel]
Options: Current Site Max Results: 100 Results per Page: 10

> 3. Click on the User ID link.

User ID	First Name	Middle Initial	Last Name	Site
OYACONIS	ORLANDO	R	YACONIS	BPD PROCUREMENT

Page 1 of 1

16. Sending the Requisition

The User is now added to the Route List as an Approver.

Click the "Send" button to actually send the Requisition to the User.

After clicking "Send," the Requisition is automatically Validated for correctness and funds availability.

17. Marking the Requisition Reviewed

Change Route	Mark Reviewed	View Form	?	

EZ REQ

Main
Items
Vendors
Supporting Docs
Form Info
Validations
Route History
Status History
Notifications
Ownership
Navigator
Return to Inbox

EZ REQ Information

Requisition Number: 0923PR1 Status: Pending Number of Items: 1
Version: BASE Stage: Requisition Total Amount: $5,000.00
Commitment: $5,000.00

Route History

To	In Date	Out Date	Comments	Status	Version	Phone	Site	Routing Sy
BRUCE FEIRTAG	09/23/03 01:37 PM		N	Sent	BASE		BPD PROCUREMENT	
ORLANDO R YACONIS	09/23/03 02:23 PM		N	Sent	BASE		BPD PROCUREMENT	
BRIAN J WOODYARD	09/23/03 11:27 AM	09/23/03 01:56 PM	Y	Reviewed	BASE		BPD PROCUREMENT	
PAMELA ROST	09/23/03 11:13 AM	09/23/03 11:27 AM	Y	Reviewed	BASE		BPD PROCUREMENT	
SHERRY E FOWLER		09/23/03 11:13 AM	Y	Originator	BASE		BPD PROCUREMENT	

NOTE:
After the Requisition has completed Validating (assuming no errors), the Status of the Requisition changes from "In Progress" to "Pending." A document cannot be edited once it is in this status unless the Route is changed and the Approver is removed.

1. Now that the Requisition has been sent, you must mark the document Reviewed by clicking the "Mark Reviewed" button.

?	

EZ REQ Information

Requisition Number: 0923PR1 Status: Pending Number of Items: 1
Version: BASE Stage: Requisition Total Amount: $5,000.00
Commitment: $5,000.00

Review Document

Comments (up to 2000 characters):

Here is a Requisition for your Approval.

Mark Reviewed	Cancel

2. Add comments if desired.

3. Click the "Mark Reviewed" button.

18. Viewing the Updated Route History and Returning to the Inbox

NOTE:
The "Route History" section now reflects that you have reviewed the document and that it has been sent.

1. You can now click "Return to Inbox."

2. If you had additional Requisitions for review, they would be displayed here. In this case, there are no remaining Requisitions awaiting review.

3. Click "Return To Home."

Congratulations! You have now successfully routed and reviewed your Requisition.